



CHASE PRIVATE CLIENT

JPMorgan Chase Bank, N.A.
P O Box 182051
Columbus, OH 43218 - 2051

March 01, 2024 through March 29, 2024

Account Number: [REDACTED] 9118

CUSTOMER SERVICE INFORMATION

Web site: **Chase.com**
Service Center: **1-888-994-5626**
Para Espanol: **1-888-994-5626**
International Calls: **1-713-262-1679**
We accept operator relay calls

00453775 DRE 703 210 09024 NNNNNNNNNN 1 000000000 61 0000

SUE HALEVY
OR DAVID HALEVY
257 S LINDEN DR
BEVERLY HILLS CA 90212-3704



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Good news – we've eliminated the Non-Chase ATM Fee for balance inquiries and transfers

As of December 10, 2023, we stopped charging the \$3 Non-Chase ATM Fee for each balance inquiry or transfer you make at a non-Chase ATM.

We continue to charge a fee for withdrawals made at a non-Chase ATM (waived for eligible accounts) and the ATM owner/network will still charge a Surcharge Fee.¹ You won't be charged these fees when you use a Chase ATM.

For more information, please see the Fee Schedule in the **Additional Banking Services and Fees** at chase.com/disclosures.

If you have any questions, please call us at the number listed on this statement. We accept operator relay calls.

¹For Chase SapphireSM Checking, Chase Private Client CheckingSM and Chase Private Client SavingsSM accounts, we waive the Chase fee and refund ATM Surcharge Fees charged to you at non-Chase ATMs. For Chase Premier Plus CheckingSM, we waive the Chase fee for the first four Non-Chase ATM transactions each statement period.

SAVINGS SUMMARY

Chase Private Client Savings

	AMOUNT
Beginning Balance	\$38,927.96
Deposits and Additions	0.42
Other Withdrawals	-38,927.96
Ending Balance	\$0.42
 Annual Percentage Yield Earned This Period	 0.02%
Interest Paid This Period	\$0.42
Interest Paid Year-to-Date	\$1.72

TRANSACTION DETAIL

DATE	DESCRIPTION	AMOUNT	BALANCE
	Beginning Balance		\$38,927.96
03/21	Interest Payment	0.42	38,928.38
03/21	03/21 Withdrawal	-38,927.96	0.42
	Ending Balance		\$0.42



CHASE PRIVATE CLIENT

March 01, 2024 through March 29, 2024
Account Number: [REDACTED] 9118

IN CASE OF ERRORS OR QUESTIONS ABOUT YOUR ELECTRONIC FUNDS TRANSFERS:

Call us at 1-866-564-2262 or write us at the address on the front of this statement immediately if you think your statement or receipt is incorrect or if you need more information about a transfer listed on the statement or receipt.

For personal accounts only: We must hear from you no later than 60 days after we sent you the FIRST statement on which the problem or error appeared. Be prepared to give us the following information:

- Your name and account number;
- A description of the error or the transaction you are unsure about, and why you think it is an error or want more information; and
- The amount of the suspected error.

We will investigate your complaint and will correct any error promptly. If we take more than 10 business days (or 20 business days for new accounts) to do this, we will credit your account for the amount you think is in error so that you will have use of the money during the time it takes us to complete our investigation.

For business accounts, see your deposit account agreement or other applicable agreements that govern your account for details.

IN CASE OF ERRORS OR QUESTIONS ABOUT NON-ELECTRONIC FUNDS TRANSFERS: Contact us immediately if your statement is incorrect or if you need more information about any non-electronic funds transfers on this statement. For more details, see your deposit account agreement or other applicable agreements that govern your account.

JPMorgan Chase Bank, N.A. Member FDIC

CHASE PRIVATE CLIENT

JPMorgan Chase Bank, N.A.
P O Box 182051
Columbus, OH 43218 - 2051

March 01, 2024 through March 29, 2024

Account Number: [REDACTED] 0611

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Web site: **Chase.com**
Service Center: **1-888-994-5626**
Para Espanol: **1-888-994-5626**
International Calls: **1-713-262-1679**
We accept operator relay calls

00400224 DRE 703 210 09024 NNNNNNNNNN 1 000000000 61 0000

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BEVERLY HILLS CA 90212-3704



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CHECKING SUMMARY

Chase Private Client Checking

	AMOUNT
Beginning Balance	\$32,199.72
Deposits and Additions	0.14
Electronic Withdrawals	-8,219.34
Other Withdrawals	-23,980.38
Ending Balance	\$0.14
Annual Percentage Yield Earned This Period	0.01%
Interest Paid This Period	\$0.14
Interest Paid Year-to-Date	\$0.77

Your account ending in 9118 is linked to this account for overdraft protection.



CHASE PRIVATE CLIENT

March 01, 2024 through March 29, 2024
Account Number: [REDACTED] 0611

TRANSACTION DETAIL

DATE	DESCRIPTION	AMOUNT	BALANCE
	Beginning Balance		\$32,199.72
03/05	First Foundation Loan Pymt PPD ID: 1320211527	-6,789.84	25,409.88
03/15	Yula Boys High Facts 000000204199185 Web ID: 9470751402	-1,429.50	23,980.38
03/21	Interest Payment	0.14	23,980.52
03/21	03/21 Withdrawal	-23,980.38	0.14
	Ending Balance		\$0.14

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JPMorgan Chase Bank, N.A. Member FDIC



P.O. Box 15284
Wilmington, DE 19850

SUE HALEVY
DAVID HALEVY
257 S LINDEN DR
BEVERLY HILLS, CA 90212-3704

BANK OF AMERICA

Preferred Rewards

Customer service information

☎ 1.888.888.RWDS (1.888.888.7937)

En Español: 1.800.688.6086

🌐 bankofamerica.com

✉ Bank of America, N.A.
P.O. Box 25118
Tampa, FL 33622-5118

Your Adv Plus Banking Preferred Rewards Gold

for March 22, 2024 to April 22, 2024

SUE HALEVY DAVID HALEVY

Account summary

Beginning balance on March 22, 2024	\$24,272.19
Deposits and other additions	0.00
ATM and debit card subtractions	-0.00
Other subtractions	-24,172.19
Checks	-0.00
Service fees	-0.00
Ending balance on April 22, 2024	\$100.00

Account number: [REDACTED] 8820

Can you spot a scam?

Be aware of these common red flags:



Contacted unexpectedly and
asked for sensitive information



Pressured to
act immediately



Asked to provide codes or
click links to verify information



Share these tips with friends and family so they can help protect themselves
Scan this code or visit bofa.com/HelpProtectYourself to see trending scams

When you use the QRC feature certain information is collected from your mobile device for business purposes.

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SUE HALEVY | Account # [REDACTED] 8820 | March 22, 2024 to April 22, 2024

Withdrawals and other subtractions

Other subtractions

Date	Description	Amount
03/25/24	Customer Withdrawal Image	-24,172.19

Total other subtractions

-\$24,172.19

Braille and Large Print Request - You can request a copy of this statement in Braille or Large Print by calling 800.432.1000 or going to bankofamerica.com and enter Visually Impaired Access from the home page.

How
are we
doing?

Your opinion is important to us.

You're invited to join the Bank of America® Advisory Panel and share what you think we're doing right—and what we need to do better. Enter code **CADD** at bankofamerica.com/AdvisoryPanel to learn more and join.

When you use the QRC feature, certain information is collected from your mobile device for business purposes

Inclusion on the Advisory Panel subject to qualifications.



SSM-08-23-0758_B | 5901785